

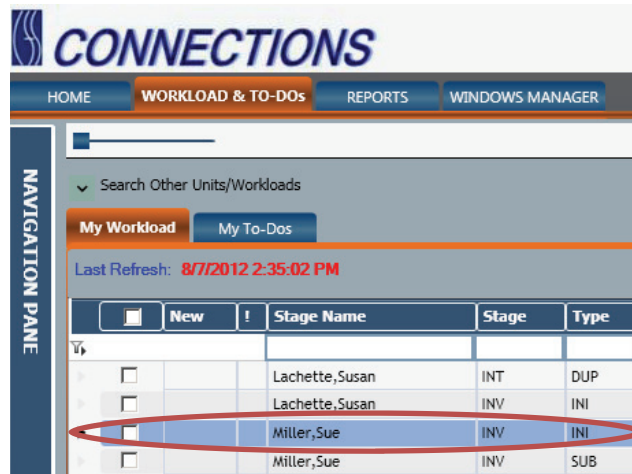


# REVIEWING PERSON HISTORY

## ~ QUICK STEPS ~

1

On the **My Workload** tab, select a stage in the grid.

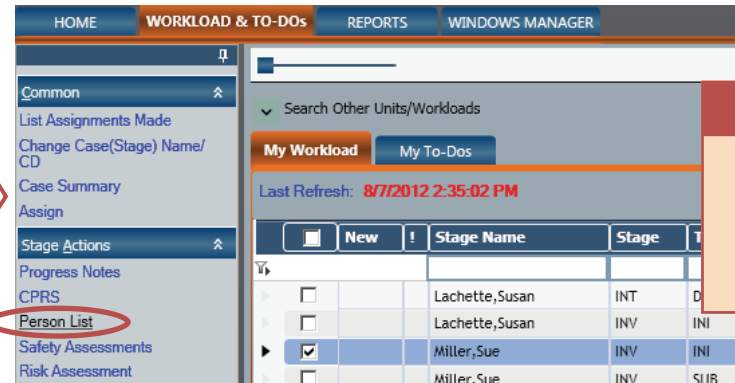


Using the Person List window, you can view information for all stages to which a person is known, including those where you have not been assigned a direct role.

Reviewing person history within an INV or FAD stage via the **Person List** link allows you to maintain information for that stage.

2

Click the **Person List** link on the **NAVIGATION PANE**.



**DID YOU KNOW?**

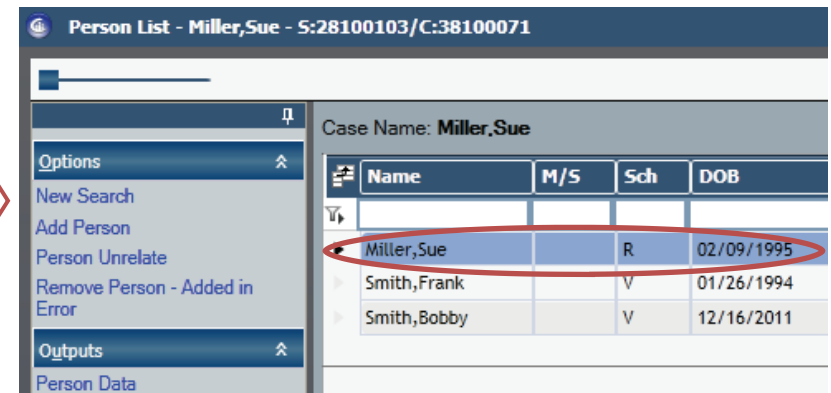
Viewing person history from within a stage provides more information than conducting a Person Search from the **Search/Maintain** drop-down menu.



This icon is used in this handout to indicate when a worker with an implied role in a stage can access and review information, in accordance with best casework practice. An implied role provides view-only access to another stage when there is a person in common (same PID) between stages. You will be alerted via the **My To-Dos** tab when you have an implied role in a stage.

3

On the **Person List** window, select a name in the grid to display information.



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4

Click the **Case List** tab, then select a case in the grid to display case information.

Person List - Miller,Sue - S:28100103/C:38100071

Case Name: Miller,Sue

Name	M/S	Sch	
Miller,Sue		R	02/09/1995
Smith, Frank		V	01/26/1994
Smith, Bobby		V	12/16/2011

Person Info | Person Merge/Split | **Case List**

**DID YOU KNOW?**

An "R" in the **Sch** (Search) column indicates that the person was related to the stage, and is probably known in another stage(s).

5

Click the **Case Summary** sub-tab, then select a stage in the grid to display stage information.

Person Info | Person Merge/Split | **Case List**

Image	Merge	Status	Case Name	
	M	OPN	Miller,Sue	38100071
		CLD	Miller,Michelle	38100070
		OPN	Green,Kelly	37700072

Comp | Case To-Dos | Case Events | **Case Summary**

Note that the Michelle Miller and Kelly Green cases are listed, which means you have an implied role in those cases because Sue Miller is known to both. You will have access to view history in each case.



6

Click the **Stage Events** sub-tab to display all events for the stage.

Comp | Case To-Dos | Case Events | **Case Summary**

Case ID: 37700072 Case Manager:

Status: Open Start Date of Case: 9/22/2009

Merge	Stage Name	Stage	Type	Determination	County	Zone	CD	PGM
	Green,Kelly	INV	INI		031			CPS
	Green,Kelly	INT	INI		031			CPS

Assignments | Stage To-Dos | **Stage Events**

Assignments Stage To-Dos Stage Events

From :  To :  Search [refresh list](#)

**DATE PICKER DROP-DOWNS**

Event Date	TX Date	Status	Type	Description	Stage	Stage Name	Stage ID	Person	Entered By
		NEW	Risk Assessment Profile	Risk Assessment Profile	INV	Green,Kelly	27700125		System
09/22/2009		COMP	Stage	Investigation Stage Opened	INV	Green,Kelly	27700125		System
09/22/2009	09/22/2009	COMP	Summary	Stage Summary	INV	Green,Kelly	27700125		System

**FILTER ROW**

**SCROLLBAR**

Count = 5

**7** Use the available tools to locate and select the event on which you would like information.

**AVAILABLE TOOLS**

- ⇒ Scroll through the event list using the **scrollbar** to its right.
- ⇒ Narrow the event list by entering a date range in the **date picker drop-down fields**.
- ⇒ Filter for specific stage events using the **filter row**.

For example, type one of the following in the blank field below the **Description** column header:

- For INV stage: “S” for Stage Summary; “I” for Investigation Conclusion
- For FSS stage: “FAM” for Family Services Stage Opened; “FAS” for FASP Submitted for Approval
- For FSI stage: “REC” for Record FSI
- For FAR stage: “S” for Stage Summary

**8** Click the **Detail** link to view detailed information associated with the event.

Event Options

Person Data  
 Notice of Existence - English  
 Notice of Existence - Spanish  
 Notice of Indication - English  
 Notice of Indication - Spanish  
 Summary of the 3 Most Recent Intakes

Assignments Stage To-Dos Stage Events

From :  To :  Search

Event Date	TX Date	Status	Type	Description
		NEW	Risk Assessment	Risk Assessment Profile
09/22/2009	09/22/2009	COMP	Stage	Investigation Stage Opened
09/22/2009	09/22/2009	COMP	Summary	Stage Summary

9

To identify a person's relationship to the case, select them in the grid and review the **Person Info** sub-tabs.

**DID YOU KNOW?**

Clicking on the **Allegations**, **Safety Assessments**, **Risk Assessment**, and **Progress Notes** links can also provide you with information on the individual's involvement in an investigation.

Stage Summary - Green,Kelly - S:27700125/C:37700072 [Read Only]

Stage: INV Classification: CPF Report/Intake Date: 9/22/2009  
 Stage Type: INI

Name	M/S	Sch	DOB	Approx	Sex	Type	Role	Rel/Int	Person ID
Green,Hunter		V	05/16/1971		M	PRN	AS	Biological Father	17700333
Unk,Unk		V	01/01/1971		M	PRN	UN	Unknown	17700336
Miller,Sue		R	02/09/1995		F	PRN	NO	Aunt/Uncle	18100122

Person Info Detail Address Phone AKA Names Identifiers Characteristics

Stage Summary - Miller,Michelle - S:28100101/C:38100070 [Read Only]

Stage: INV Classification: CPF Report/Intake Date: 6/3/2008  
 Stage Type: INI

Name	M/S	Sch	DOB	Approx	Sex	Type	Role	Rel/Int	Person ID
Miller,Michelle		V	05/23/1970		F	PRN	CS	Mother	18100120
Miller,Mister		V	05/06/1962		M	PRN	CS	Biological Father	18100121
Miller,Sue		V	02/09/1995		F	PRN	CM	Child	18100122

Person Info Detail Address Phone AKA Names Identifiers Characteristics



Let's say you've opened the Stage Summary window for the Investigation stages in the Kelly Green (above) and Michelle Miller (at left) cases. You will notice that Sue Miller is the aunt in the Kelly Green case and the child in the Michelle Miller case. You can access view-only information about each stage by clicking on the tabs or NAVIGATION PANE links.